

**FAMILY PLANNING PROGRAM  
CLINICAL SITE VISIT PRE-VISIT MATERIALS CHECKLIST**

Please prepare and have available the following items for review at the clinical site visit.

- ☐ Language interpretation services available for clients
- ☐ Schedule of clinic hours, including walk-in hours and evening and weekend hours that is made available to clients, i.e. wall chart or handout
- ☐ Male and female comprehensive history forms used, paper or EMR
- ☐ Exam sheet used, paper or EMR
- ☐ 10 client records of client's seen recently for a comprehensive visit with results of lab work back in record
- ☐ 5 client records of clients recently seen for pregnancy test only
- ☐ Sterilization log for vasectomies, Essures, TL paid for with Title X or CFPI funds.
- ☐ Examples of handouts provided to clients including new client packet
- ☐ Pregnancy test form or EMR template
- ☐ STI Registry reporting form clinic uses
- ☐ HIV education materials provided to clients
- ☐ Copies of program consent, IUC and implant consents used
- ☐ After hours emergency care instructions provided to clients
- ☐ Written internal clinical emergency procedures (vasovagal reactions, anaphylaxis, syncope, cardiac arrest, shock, hemorrhage and respiratory difficulties)
- ☐ Pharmacy protocols and annual pharmacist signature sheet
- ☐ Expired medication disposal written internal policy
- ☐ Pharmacy license
- ☐ Pharmacy medication sign out log
- ☐ Inventory control and reconciliation documentation
- ☐ Tracking system for abnormal lab and referral follow up
- ☐ Written and dated referral list for services beyond the scope of the clinic. Referral sites listed by type (e.g. infertility, prenatal care, pregnancy termination, primary care, mental health, drug/ETOH referral sites, resources for IPV, Medicaid enrollment, genetic issues)
- ☐ Written internal mandatory reporting procedure
- ☐ Human trafficking resources
- ☐ Notice of privacy practices provided to clients
- ☐ RN, APN, PA and physician licenses
- ☐ MOU or job description of consulting physician describing physician responsibilities and functions including signature of 10% of charts
- ☐ Clinical manual signature sheets

- ❑ Evidence of malpractice liability insurance for contracted staff
- ❑ Standing orders for RNs for dispensing meds
- ❑ Documentation of support staff training for delegated nursing/medical tasks
- ❑ Written internal procedures for infection control/cleaning of exam rooms, equipment, sterilization of instruments
- ❑ BBP exposure policy and procedure for staff and documentation of periodic staff training
- ❑ Documentation of equipment maintenance, both internal and external, including autoclave, microscope, Hemocue
- ❑ Refrigerator temp log
- ❑ Procedure for ensuring effective sterilization of instruments, e.g. spore testing
- ❑ Client satisfaction surveys obtained in the last 12 months
- ❑ Internal quality assurance activities policies and documentation
- ❑ Agency internal written policies/procedures for family planning
- ❑ CLIA license
- ❑ Laboratory manual including written wet prep procedure and most current CLIA waived test package inserts/instructions
- ❑ Wet prep biannual provider proficiency testing documentation
- ❑ Staff training and proficiency documentation for CLIA waived tests
- ❑ CLIA waived test controls logs
- ❑ Lab log for labs sent out (paper, online or EMR)